



**SWADVISERS**  
WE PLAN. YOU LIVE.

**Retirement Budget  
Worksheet**

Name

DOB

Name

DOB

EXPENSE CATEGORY	EXPENSE ITEM	CURRENT		RETIREMENT		Notes
		MONTHLY	ANNUAL	MONTHLY	ANNUAL	
HOUSING	Rent/Mortgage					
	Maint./Condo/HOA Fees					
	Personal property tax					
	Home/Renter Insurance					
	Home Repairs/Furniture					
	Lawn/Gardening					
	House Cleaning					
	Pest Control					
	Total Second Home					
	<i>Additional</i>					
<b>HOUSING TOTAL</b>						
UTILITIES	Electric					
	Gas/Oil/Propane					
	Water/Sewer					
	Garbage					
	Subscription Services					
	Phone Services					
	Internet					
	Security Monitoring					
	Television					
	<i>Additional</i>					
<b>UTILITIES TOTAL</b>						
MEDICAL HEALTH	Medical Ins. Premium					
	Dental Insurance					
	Vision Insurance					
	Prescription Ins.					
	Out of Pocket Medical					
	Fitness Membership					
	<i>Additional</i>					
<b>MEDICAL/HEALTH TOTAL</b>						

EXPENSE CATEGORY	EXPENSE ITEM	CURRENT		RETIREMENT		Notes
		MONTHLY	ANNUAL	MONTHLY	ANNUAL	
TRANSPORTATION	Car Payment/Lease					
	Car Insurance					
	Car Maintenance					
	Fuel					
	Parking/Tolls/Transit					
	Tags/Taxes/Inspection					
	<i>Additional</i>					
<b>TRANSPORTATION TOTAL</b>						
FOOD/ ENTERTAINMENT	Groceries					
	Dining Out					
	Entertainment					
	Lessons/Sports					
	Membership/Clubs					
	Travel/Vacation					
	<i>Additional</i>					
<b>FOOD/ENTERTAINMENT TOTAL</b>						
PERSONAL	Clothing					
	Personal Grooming					
	Pet					
	Gifts Holiday/Birthdays					
	<i>Additional</i>					
<b>PERSONAL TOTAL</b>						
MISC. DEBT	Credit Cards					
	Tuition/Student Loans					
	Legal Fees					
	Alimony/Child Support					
	Church/Charity Donations					
	<i>Additional</i>					
<b>MISC. DEBT TOTAL</b>						
<b>TOTAL HOUSEHOLD EXPENSES</b> (Not Including Savings)		CURRENT		RETIREMENT		NOTES
		MONTHLY	ANNUAL	MONTHLY	ANNUAL	